

**POSITION DESCRIPTION****IMPORTANT: PLEASE READ INSTRUCTIONS ON PAGES 2 and 3**

DOA-15302 (C07/2015) PREVIOUSLY OSER-DMRS-10 State of Wisconsin Department of Administration/Division of Personnel Management	1. Position No.	2. Cert / Reclass Request No.	3. Agency No.  566
4. NAME OF EMPLOYEE	5. DEPARTMENT, UNIT, WORK ADDRESS Wisconsin Department of Revenue IS&E/Compliance/Section/Unit		
6. CLASSIFICATION TITLE OF POSITION  Revenue Agent 4			
7. CLASS TITLE OPTION <i>(to be filled out by Human Resources Office)</i>	8. NAME AND CLASS OF FORMER INCUMBENT		
9. AGENCY WORKING TITLE OF POSITION  Revenue Agent 4 – Lead Worker	10. NAME & CLASS OF EMPLOYEES PERFORMING SIMILAR DUTIES		
11. NAME AND CLASS OF FIRST-LINE SUPERVISOR	12. FROM APPROXIMATELY WHAT DATE HAS THE EMPLOYEE PERFORMED THE WORK DESCRIBED BELOW?		

13. DOES THIS POSITION SUPERVISE SUBORDINATE EMPLOYEES IN PERMANENT POSITIONS? Yes \_\_\_ No X  
IF YES, COMPLETE AND ATTACH A SUPERVISOR EXCLUSION ANALYSIS FORM.

14. POSITION SUMMARY – PLEASE DESCRIBE BELOW THE MAJOR GOALS OF THIS POSITION:

SEE ATTACHED

15. DESCRIBE THE GOALS AND WORKER ACTIVITIES OF THIS POSITION *(Please see sample format and instructions on Page 3.)*

- GOALS: Describe the major achievements, outputs, or results. List them in descending order of importance.
- WORKER ACTIVITIES: Under each goal, list the worker activities performed to meet that goal.
- TIME %: Include for goals and major worker activities.

TIME %

GOALS AND WORKER ACTIVITIES

(Continue on attached sheets)

SEE ATTACHED

16. SUPERVISORY SECTION - TO BE COMPLETED BY THE FIRST LINE SUPERVISOR OF THIS POSITION *(See Instructions on Page 2)*

- a. The supervision, direction, and review given to the work of this position is ☐ close ☐ limited ☒ general.
- b. The statements and time estimates above and on attachments accurately describe the work assigned to the position.  
*(Please initial and date attachments.)*

Signature of first-line supervisor \_\_\_\_\_ Date \_\_\_\_\_

17. EMPLOYEE SECTION - TO BE COMPLETED BY THE INCUMBENT OF THIS POSITION

I have read and understand that the statements and time estimates above and on attachments are a description of the functions assigned my position.

Signature of employee \_\_\_\_\_ Date \_\_\_\_\_

18. Signature of Human Resources Manager \_\_\_\_\_ Date \_\_\_\_\_

DISTRIBUTE COPIES OF SIGNED FORM TO:

☐ P-FILE ☐ SUPERVISOR ☐ EMPLOYEE ☐ CERT REQUEST COPY

POSITION SUMMARY (Line 14)

This is an objective level professional position responsible for achieving compliance with tax laws administered by the department through leading staff, education, and collection activities. This position acts as a lead worker for Revenue Agents in the Compliance Bureau and works on complex collection cases. This position will support the supervisor by providing technical assistance to staff and acting as a mentor and trainer of Revenue Agents in collection philosophy, system expertise, and investigative techniques. An employee in this position will act as the first level for escalated taxpayer calls, assigning work and managing unit activities, and is expected to be knowledgeable in all skills and functions of other agents within the assigned unit. This employee will also be a reference in areas such as bankruptcy and personal liability, combined reporting, revocation, statewide debt collection, income and business tax types and related collection activities. Duties include preparing complex adjustments to overdue assessments and explaining complex collection actions of the department to customers and their representatives as well as other department personnel. The work is performed under general supervision.

TIME %      GOALS AND WORKER ACTIVITIES (Line 15)

- |     |  |
|-----|--|
| 45% | A. Performance of Lead Worker Activities.  |
| 15% | A1. Provide instruction to Revenue Agents regarding applicable rules, policies, and procedures.  |
|     | A2. Prepare and distribute phone schedules, correspondence, other work assignments, and assist in defining projects.   |
|     | A3. Instruct, assist, and monitor unit personnel in the performance of work assignments, and monitor workloads and provide backup at peak workload times.  |
|     | A4. Serve as a first step for callers requesting to speak to a supervisor or someone at a higher level regarding the most complex delinquent accounts or requests denied by the Revenue Agent.                                     |
|     | A5. Instruct and assist unit staff in the use of computer and telephone equipment.   |
|     | A6. Monitor call volumes and assign additional staff to telephone customer service as needed.  |
|     | A7. Review and approve Revenue Agent requests to adjust accounts and prepare schedules or worksheets to determine actual liabilities on complex accounts.  |
|     | A8. Lead and monitor unit activities during supervisor's absence.  |
| 15% | A9. Develop and provide individual and group training, as needed, and assist supervisors with quality review of agent work.  |
|     | A10. Prepare and maintain statistical records and related reports.   |
| 15% | A11. Review and approve payment plans and wage certification change requests from Revenue Agents.  |
|     | A12. Act for the Revenue Agent Supervisor in his/her absence to resolve compliance problems. Delegated authority to include, but no limited to, filing and satisfying liens and amending or releasing wage attachments and levies. |
|     | A13. Develop and update Compliance Bureau Directives and training materials.   |
| 25% | B. Collection of Debt.   |
|     | B1. Hold informal hearings by phone, emails or in person in or out of the office to determine the customer's ability to pay.   |
|     | B2. Locate and contact customers by letter, telephone, email, or personal visit to explain the basis of an assessment, collect the debt, or enter into a payment plan.   |

REVENUE AGENT 4

Position #

February 19, 2020

- B3. Locate the customer's employer, financial institution, or other assets and income sources so that collection activity including levy, wage attachment, warrant filing, and legal garnishment can be initiated when appropriate.
- B4. Investigate accounts for appropriate action, including revocation of licenses or permits and assessment of personal liability.
- B5. Prepare letters for Secretary's Office in response to customers and their representatives.
- B6. Resolve delinquencies from the proceeds of real estate closings and furnish the purchaser with necessary satisfactions or partial releases of delinquent tax warrants.

- 10% C. Establishment of Tax Liability.
  - C1. Obtain tax returns or sufficient evidence in lieu of returns to compromise overdue accounts which are based on estimated assessments, and ensure returns have been filed for all periods with a filing requirement.
  - C2. Investigate filed returns which appear to have irregularities and adjust to actual liability.
  - C3. Refer information to auditor as necessary to assist in preparing schedules, work papers, and assessment worksheets.
- 10% D. Provision of Customer Service.
  - D1. Assist customers with the preparation of their tax returns or credit claim.
  - D2. Answer questions from customers and representatives by phone, email, letter, or in person relative to complex areas of tax laws, and explain basis of assessments.
  - D3. Answer complex questions from employers, financial institutions, government agencies, and other partners regarding customer accounts.
  - D4. Explain bankruptcy, occupational licensing, and personal liability laws, adjustments and implications to customers, their representatives and other department employees.
- 10% E. Performance of Other Duties as Assigned.
  - E1. Record all activities in customer relation manager.
  - E2. Keep informed on technical information memorandums, administrative and compliance directives, statutory changes, etc.
  - E3. Attend and participate in unit, section, bureau and departmental meetings, teleconferences, and training sessions.
  - E4. Maintain and timely file reports as assigned.
  - E5. Other duties as assigned.
  - E6. Serve as a subject matter expert related to the development, testing, training,

REVENUE AGENT 4

Position #

February 19, 2020

KNOWLEDGE, SKILLS, AND ABILITIES

1. Knowledge of Wisconsin income, sales, withholding and specialty tax laws, statutes, administrative codes, and tax forms.
2. Knowledge of statewide debt collection laws.
3. Knowledge of department, division, bureau, section, and unit organizational structure, office operations, policies, procedures, and work rules.
4. Knowledge of collection and research methods and techniques.
5. Effective oral and written communication skills.
6. Computer skills including Microsoft Office Products, i.e., Word, Outlook, Excel.
7. Interpersonal relation skills and the ability to work both individually and as a member of a team.
8. Knowledge of general business practices, bookkeeping, and commercial law concepts and practices.
9. Excellent customer service skills.
10. Mathematical skills.
11. Organizational skills, including ability to multi-task.
12. Knowledge and skills related to providing training, including the ability to identify training needs, develop training materials, and present training.
13. Account resolution techniques.
14. Knowledge of the department's integrated tax system (WINPAS).